



## CALIBRATION CHECKLIST FOR REVIEWING OFFICIALS

The role of a Reviewing Official is to review the written draft of a performance evaluation before the supervisor shares it with the employee. Reviewing Officials cannot change the rating. Any concerns should be addressed in discussions with the immediate supervisor during this step. Reviewing Officials should ensure that:

- Each individual overall rating is consistent with the with the ratings for individual elements of the plan as well as the rating justification descriptions;
- Overall ratings are consistent with the measures being used across the department or agency; and
- The supervisor has complied with the Personnel Regulations and any department procedures.

OHR recommends that Reviewing officials use a technique called calibration to ensure managers and supervisors are applying measures consistently and in a fair and equitable manner across the organizational unit. Calibration involves comparing ratings across employees in the department or agency. The checklist below will assist you in using the calibration technique effectively.

1. Identify the measure being used by asking the following questions:
  - Is the measurement clear and focused to avoid misinterpretation?
  - Can the measure be quantified and compared to other data?
  - Is the measure achievable, reasonable, and credible under conditions expected?
  - Does the measure fit into the organization's constraints? Is it cost-effective?
  - Is the measurement doable within the time frame given?
2. Use the quality, alignment and reality tests to find out if the measurement is being evaluated consistently across the department or agency:

### The **Quality** Test

- Were there objective measures for the specific expectation or competencies?
- Does the measurement include a clear statement of the end results expected?
- Are the measures challenging, but at the same time, attainable?
- Have those whose performance is being measured had the opportunity to be fully involved in the development of the measurements?
- Was performance evaluated against specific expectations or behavioral indicators, which are targeted or desired level of performance?
- Were evaluations held at the end of the performance cycle?

### The **Alignment** Test

- Do the measures align behavior and specific expectations with strategy and or mission, and focus the department or agency on its priorities?
- Do the measures identify gaps between current status and performance aspirations, thereby highlighting performance opportunities?
- Are the major programs and major components of the program covered?
- Are there comparisons of employees' who are performing the same or similar work?
- Is the pay recommendation consistent with the overall rating and is the overall rating consistent with the evaluation?
- Do all direct reports have a plan?

### The **Reality** Test

- Reviewing Officials should meet with their managers and supervisors annually in order to gain a common understanding of how performance is being measured and evaluated. Managers and supervisors should bring a sampling of PPE forms representative of the total group of employees they supervise. Discussions during the meetings should be treated as confidential.